



## **Healthcare Professional**

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### **Quick Reference Guide**

**Version 3.4.2021**

**For further assistance, call the VAMS Zoom Room:**

**646-876-9923**

**Code: 2245615603**

## **PRIVACY NOTE**

To receive the COVID-19 vaccine, personally identifiable information (PII) and protected health information (PHI) will be entered into VAMS. PII is any data that could potentially identify an individual. PHI includes demographic information and relates to the individual's past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA visit:

<https://www.cdc.gov/phlp/publications/topic/hipaa.html>

## **How to Use the Quick Reference Guide**

This manual is to be used by healthcare professionals to better understand and manipulate VAMS. In this guide, you will find sets of instructions to assist you while maneuvering VAMS. If you need more assistance, a User Manual is available with more information.

## **Disclaimer**

The content contained in WV VAMS training materials is provided only for educational and informational purposes for the clinic users in West Virginia. West Virginia attempts to ensure that content is accurate and obtained from reliable sources but does not represent it to be error-free. West Virginia does not warrant that any functions on the VAMS website will be uninterrupted, that defects will be corrected, or that the website will be free from viruses or other harmful components. Any links to third party information on the website are provided as a courtesy and do not constitute an endorsement of those materials or the third party providing them.

## Standard Clinic Functions

### Activate Your User Account:

1. Check your email for the link to set up your account.
2. Click the registration link in your email.
3. Verify your email address.
4. Create your password.
5. Check your email account for a verification code.
6. Enter the **verification code**.
7. Read the terms and conditions and check the box if you agree.
8. Click **Create Account**.

### Record Past Vaccinations

1. Click the **Record Past Vaccinations** button.
2. Enter the provider's email address.
3. Click **Search**.
4. Click **Record Vaccinations**.
5. Enter the recipient's name.
6. Select **Yes** or **No** regarding the pre-vaccination questionnaire.
7. If yes, select the **Manufacture, Product, Vial lot number, Expiration Date, Time and Date**.
8. Click **Done**.

### Log Vaccination:

1. Access the recipient's record.
2. Click the **Vaccine Administration** tab.
3. Click **Log Vaccination**.
4. Complete the questions.
5. Click **Next**.

#### 2D Scanner:

6. Choose **Scan UoU** barcode.
7. Click **Next**.
8. Scan the barcode.
9. Click **Next**.
10. Enter the vaccine administration site.
11. Confirm the information.
12. Click **Next**.

#### Manually:

5. Choose **Enter UoU** (vial) information manually.
6. Select the **Manufacturer**.
7. Select the **Product**.
8. Select the **UoU (vial) lot number**.
9. Click **Next**.

Choose **Yes** or **No** if the vaccine was successful.

#### Yes:

1. Answer questions about waste.
2. Click **Next**.

#### No:

1. Click **Next**.
2. Answer questions about the ability to reattempt.
  - a. **Yes** – directed to Log Vaccine to restart the process.
  - b. **No** – answer questions about waste.
3. Click **Next**.

### Second Dose Eligibility:

1. After the vaccination was administered, a page will inform you when the recipient is to receive their next vaccination.
2. VAMS will send the recipient an email notifying them to schedule their next vaccine.

### Access Multiple Clinics in VAMS:

1. Click on the drop-down arrow next to your name in the upper right-hand corner of the screen.
2. Click **Switch Portals**.
3. Select the Access Portal button of the clinic you would like to access.

### View/Manage Scheduled Appointments:

4. Click on **Manage Appointments** tab.
- Use the drop down to filter your search for checked in appointments.

### Cancel Appointments:

1. Find the recipient on the **Manage Appointments** tab.
2. Click **Cancel**.
3. Select the cancellation reason.
4. Click **Cancel Appointment**.
5. Click **Ok**.

### Access a Recipient's Record:

1. Click on the **Manage Appointment's** tab.
2. Select the recipient.
3. Click on the recipient's name.
4. Verify the identity of the recipient.
5. Click **Next**.

**Invalidate and Edit Vaccination  
Records**

1. Click **Manage appointments**.
2. Click the **Search past vaccinations** button.
3. Enter recipient's **First Name**.
4. Enter recipient's **Last Name**.
5. Enter recipient's **Date of Birth**.
6. Click **Search**.
7. Click **View Record**.
8. Click **Vaccine Administration**.
9. Click **View Record**.
10. Click the **Edit** or **Invalidate** button.

**To Edit a record:**

1. Click **Edit**.
2. Update the information.
3. Click **Save**.
4. Select the **Reason for the update**.
5. Click **Save**.

**To Invalidate  
the record:**

1. Click **Invalidate Record**.
2. Select the **Reason for the invalidation**.
3. Click **Invalidate Record**.

## Third-Party Functions:

### Add Third-Party Clinic Vaccine Recipients in VAMS

1. Click the **Manage Recipients** tab.
2. Click **Add Recipient**.
3. Enter the recipient's information. The recipient's home address will default to the third-party clinic's address.
4. Click **Next**.
5. Enter the recipient's insurance information, if applicable.
6. Click **Next**.
7. Review the information.
8. Verify the information is correct. If not, click **Previous** to update the information.
9. If the information is correct, click **Next**.

### Third-Party Pre-Vaccination Actions:

1. Access the recipient's record.
2. If the recipient has not completed pre-vaccination tasks, click **Edit Recipient Details**.
3. Edit the details and click **Next**.

### Bulk Upload Third-Party Recipients:

1. Click the **Manage Recipients** tab.
2. Click **Import Recipients**.
3. Click on the **Recipient Import Template** link. The template will download to your computer.
4. Enter the required recipient information fields.
5. Save the template as a CSV file.
6. On the Import Recipient page, click **Upload Files**. You can also drag and drop your organization list into the Drop Files area of the page.
7. Click **Close**.

After importing a list of recipients:

- A message appears stating your list is in the queue to upload.
  - You will receive an email, notifying you the upload was complete.
  - A log will appear on the Recipient Import page.
8. Click on the **Recipient Import** tab.
  9. Click the **Import ID**. You will be directed to the Recipient Import page.
  10. The Result Log for Bulk Upload is your uploaded file.
  11. Click the **Result Log for Bulk Upload** link. Your file will open.
  12. Scroll to the right until you see the status column. The status column states if the recipient was added to the system.
    - If you see an error message, there's duplicate or missing information. These recipients have not been uploaded into the system.

If you see Success, the recipients were uploaded into the system correctly.

### Third-Party Log Vaccination:

1. Access the recipient's record.
2. Click the **Vaccine Administration** tab.
3. Complete the pre-vaccine questions.
4. Click **Next**. You will return to the recipient's record page.
5. Click **Log Vaccination**.

#### 2D Scanner:

6. Choose **Scan UoU barcode**.
7. Click **Next**.
8. Scan the barcode.
9. Click **Next**.
10. Enter the vaccine administration site.
11. Confirm the information.
12. Click **Next**.

#### Manually:

6. Choose **Enter UoU (vial) information manually**.
7. Select the **Manufacturer**.
8. Select the **Product**.
9. Select the **UoU (vial) lot number**.
10. Click **Next**.

Choose **Yes** or **No** if the vaccine was successful.

#### Yes:

13. Answer questions about waste.
14. Click **Next**.

#### No:

11. Click **Next**.
12. Answer questions about the ability to reattempt.
  - a. **Yes** – directed to Log Vaccine to restart the process.
  - b. **No** – answer questions about waste.
13. Click **Next**.

**Record Vaccine Administration Outside of VAMS:**

1. Click **Manage Recipients**.
2. Choose the recipient from the table.
3. Click **Vaccine Recipient**.
4. Click **Log Vaccination**.
5. Answer **Have you ever received the COVID-19 vaccine?**

If you chose **Yes**:

6. Choose the type of vaccine.
7. Enter the **Prior vaccine date**.
8. Click **Continue**.
9. Log the vaccine.

If you chose **No**:

6. Click **Continue**.
7. Review the recipient's information.
8. Log the vaccine.